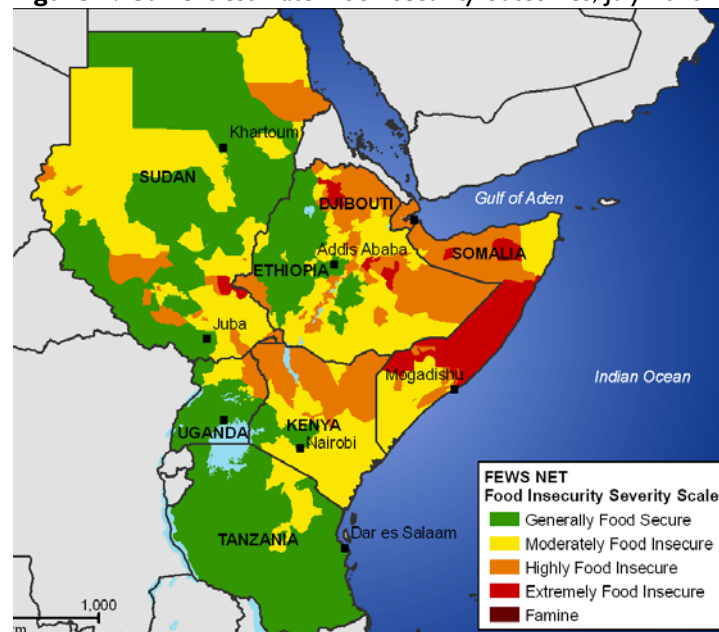


EAST AFRICA Regional Food Security Update

July 2010

- Regional food security has gradually improved due to enhanced livestock productivity and value as well as increased food availability in the region. Further improvements in food security conditions are expected due to the July harvest in the bimodal areas of Uganda, and parts of Kenya and Somalia.
- In cropping areas, the main harvest season (July to August) has just started with good crop prospects especially in most of Kenya, Tanzania, Uganda, the *belg*-dependent areas of Ethiopia, and southern Somalia. Overall production of maize, millet, sorghum and other important food crops are expected to be normal in most areas.
- In the pastoral and agropastoral areas of northern Kenya, most of Somalia, Afar and Somali Regions of Ethiopia and parts of Sudan, sustained improvements in rangeland conditions have increased livestock productivity and value. Livestock prices are substantially higher than the five-year average due to the lifting of the livestock import ban by the Kingdom of Saudi Arabia and increased demand for export to the other Gulf States, Jordan, and Egypt.

Figure 1. Current estimated food security outcomes, July 2010



Source: FEWS NET

For more information on FEWS NET's Food Insecurity Severity Scale, please see: www.fews.net/FoodInsecurityScale

- Despite generally improving conditions in the region, acute food insecurity conditions will persist and the number of people in need of assistance is likely to increase through August/September in conflict-affected regions, including parts of northern and southern Sudan and south/central Somalia.

Current food security conditions

The overall food security conditions in the East Africa region continue to show improvement following the normal to above-normal rainfall in most parts of the region leading to improved crop and livestock production — the two mainstays of the rural economy. The final outcomes of the March to May rainfall season will, however, be clearer when the ongoing post season assessments are completed by FEWS NET country offices and partners in early August followed by the updating of the current estimated food security outcomes (Figure 1). Currently about 17 million people are highly or extremely food insecure, a drop from an estimated 20 million in July last year. The continued food security improvements can also be attributed to a substantial decline in staple food prices in most reference markets in the region and improved livestock productivity and value. Despite the localized but significant floods in late May/early June which caused population displacements and destroyed standing crops and grain stores in parts of Kenya, southern Somalia, and Ethiopia, the seasonal rains were largely beneficial in terms of crop production, availability of rangeland resources and hydro-power generation. As a result, livestock conditions have improved across the region, while cereal and other food crop production is expected to be average to above average in most parts of the region.

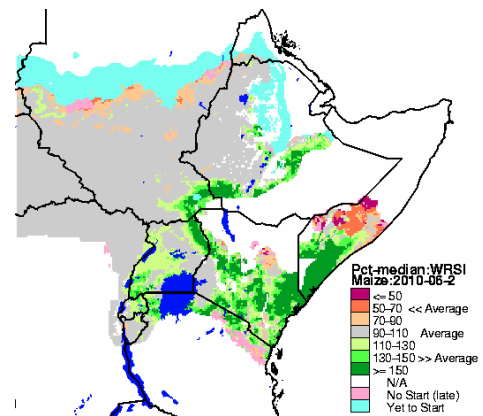
In the cropping areas, the main harvest season (July to August) has just started with good crop prospects, especially in most of Kenya, Tanzania, Uganda, the *belg*-dependent areas of Ethiopia, and the inter-riverine areas of southern Somalia. Overall production of maize, millet, sorghum and other important food crops are expected to be normal in most areas. Cereal stocks among farming communities and overall food availability in the region has already been good following the favorable October-December rains.

Heavy March to May seasonal rains caused flooding within localized areas (the Juba and Shabelle regions of Somalia, parts of Afar, the Somali SNNP regions of Ethiopia, and parts of Kenya), which led to a short-term decline in food availability and high prices. In most areas, food availability and access in reference markets are steadily returning to normal. However, in the **flood-affected communities** of the southeastern and coastal lowlands of Kenya, an estimated 200,000 MT or about 50 percent of the maize harvest from the previous season is suspected to have been infected by aflatoxin poisoning due to excess rains, resulting in significant losses for farm households that had been slowly recovering from the devastating effect of five successive seasons of crop failure. Nonetheless, maize production prospects for the critical long rains maize harvest in this part of Kenya are favorable (Figure 2), which depicts better than normal crop conditions across key agricultural areas in the region. Subsequently, food availability is likely to continue improving in the region. Furthermore, increased soil moisture from the flooding offers an opportunity for off-season recession farming and harvest during the end of the dry season in late October especially in southern Somalia and the Somali region of Ethiopia.

In the pastoral and agropastoral areas of northern Kenya, most of Somalia, Afar and Somali Regions of Ethiopia, and parts of Sudan, sustained improvements in rangeland conditions (Figure 3) as a result of above-normal rainfall have led to improved livestock productivity and value, hence improving terms of trade between livestock/livestock products to cereals. However, there are areas of persistent drier-than-normal conditions along the Sudan/Ethiopia border that require close monitoring during the current rainfall season. Current livestock prices are substantially higher than the five-year average due to the lifting of the livestock import ban by Saudi Arabia in November 2009 (a major destination of the livestock export from the region) and increased demand for export to the other Gulf States, Jordan, and Egypt. With the increased livestock prices and reduced costs of cereals, pastoral households are now able to buy more than what they could buy during the drought. In the last six months for instance, in the livestock-dependent regions of northern Somalia, the average terms of trade between goat and cereals have improved by 48 percent (from 48kg of rice in last December to 71kg of rice per goat in June). Similar trends were also reported in key pastoral regions in Sudan and Ethiopia.

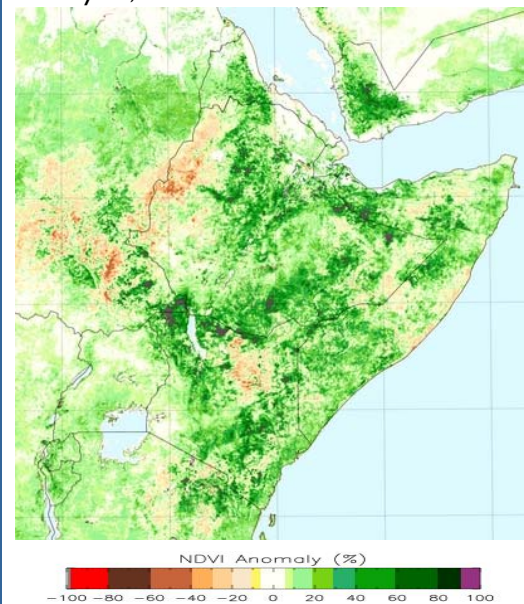
Despite generally improving conditions in the region, acute food insecurity conditions will persist and the number of people in need of assistance is likely to increase in **conflict-affected regions** including parts of **northern and southern Sudan and south/central Somalia**. Recurrent conflict, civilian displacement, and market disruptions continue to affect access to food and income for Internally Displaced Persons (IDPs) and market-dependent poor urban households in those regions. In northern Sudan, due to early depletion of household cereal stocks, the lean season for farming communities started early in January/February instead of May/June. The most food insecure populations are located in Darfur, Red Sea State, and parts of Kassala, North and South Kordofan, and Blue and White Nile states. In southern Sudan, cereal prices remain high and harvests are not expected until September when green consumption of early-planted crops will start. In both northern and

Figure 2. WRSI/maize crop anomalies as of June 30, 2010



Source: USGS/FEWS NET

Figure 3. Vegetation condition anomalies as of May 31, 2010



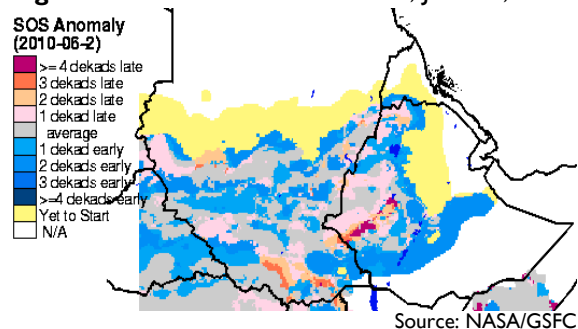
Source: USGS/FEWS NET

southern Sudan, food insecurity is expected to increase until August/September and then decline during October–December, as harvests come in. Renewed armed conflict in southern Somalia since January and parts of Darfur and southern Sudan also resulted in new civilian displacements, restrictions of seasonal labor migration (hence loss of income) and disruptions of market activities and trade flow as well as the delivery of humanitarian supplies.

Seasonal Progress

Currently, there is a general cessation of the March–May rains in Tanzania, most of Kenya, eastern and southern Ethiopia, and southern and central Somalia, but moderate rains continue along the East African coastal strip, Uganda, western Ethiopia, and southern Sudan. As expected, the rainfall belt is shifting northwards to the northern sector and consensus seasonal forecasts by Igad Climate Prediction and Application Centre (ICPAC), IRI, ECMWF and two national meteorological agencies in Ethiopia and Sudan indicate the increased likelihood of normal to above-normal June–September rainfall, which is critical for cropping in southern Sudan and Ethiopia. Figure 4 depicts the timely onset of the June – September rainfall season across Ethiopia and Sudan, providing good initial signals for expected rainfall performance in these countries. However, there are a few localized areas of concern along the Sudan/Ethiopia border and parts of northern Sudan that may require close monitoring due to a significant delay in the start of the season.

Figure 4. Start of season anomalies, June 30, 2010



The overall performance of the March–May rains in terms of intensity, duration, and coverage was largely normal throughout the region. In the livestock-dependent eastern sector of the region, substantial and well-distributed rains were received in most parts of Somalia, parts of Ethiopia, Djibouti, and northern Kenya. Similarly, most of the high potential cropping areas of Kenya, Tanzania, Uganda, and the *belg*-dependent agropastoral regions of Ethiopia received normal to above-normal rainfall. Compared to the long-term average, the rainfall in the March–May period was 140–180 percent higher in most parts of Somalia, Kenya, and Ethiopia. Rains were generally beneficial for crop performance, pasture replenishment, and water recharge as well hydropower generation. However, in parts of southern Sudan and north-central Kenya, rainfall performance was below normal, which reflected vegetation performance (Figure 3). This localized below-normal performance is likely to have minimal effect on pastoralists because of increased migration options in the neighboring areas, where rangeland conditions are favorable.

Markets and trade

In response to anticipated increased seasonal supply in the main producing areas, market prices for the main staples have continued to decline. In particular, significant reduction of cereal prices are reported from Kenya, Uganda and parts of Ethiopia, mainly due to increased market supplies as farmers have begun to release their old stocks immediately before the main harvest. As the main harvest season is approaching, these falling trends are likely to continue, especially in bimodal areas of Uganda, Kenya, and Tanzania. These price decreases are expected to improve poor and market-dependent households' access to food.

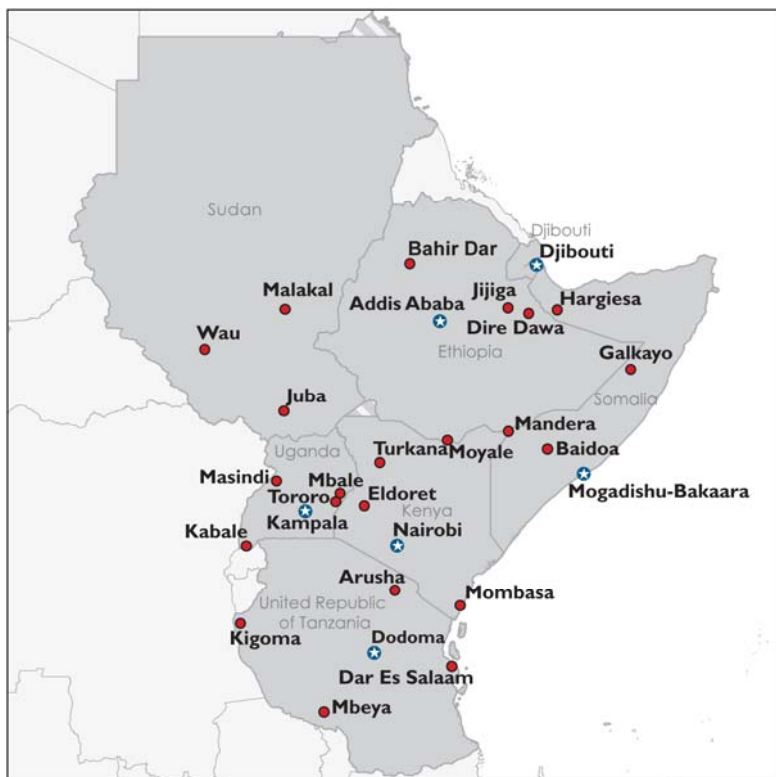
Exceptions are however, the south and central regions of Somalia, where compared to the same month last year, prices of sorghum and maize have increased between 15–70 percent including some of the key producing areas such as the Juba Valley regions. The unseasonable cereal price increments in southern Somalia are mainly due to below-average harvests last season coupled with dramatic shifts in consumption patterns from high value imported commodities like pasta and rice to less expensive and locally produced cereals such as maize, especially during the period of hyperinflation and high food prices in early 2008–09 as well as the suspension of food assistance due to insecurity.

Informal and formal cross-border trade in the region continued to play a major role in food markets. Data from six sites monitored by FEWS NET recorded a total of 20,327.31 MT of cereals and pulses crossing the border between Uganda, Kenya, Ethiopia and Somalia since February. Moreover about 4,490.76 MT of non-food items and 11,587 head of livestock also crossed between the Uganda and Kenya border since February.

Cross-border trade within the East Africa region is expected to improve with the signing of the East Africa Market Protocol in early July. The new agreement allows the free movement of people and goods between markets in Kenya, Tanzania, Uganda, Rwanda and Burundi, with a population of over 120 million. The agreement is also expected to allow the free movement of pastoral communities in these sub-regions where livelihoods revolve around the livestock sector. Such movement will insure pastoralists from the risk of drought and enhance their cropping options during bad years. Greater options for migration in search of water and pasture beyond national boundaries will likely reduce environmental degradation, overgrazing, and resource-based conflicts due to limited options for grazing. The protocol is also expected to promote livestock trade within the region and hence improve pastoral livelihoods.

EAST AFRICA Monthly Price Bulletin

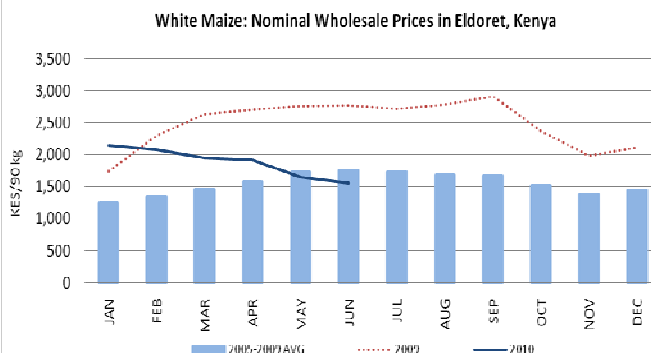
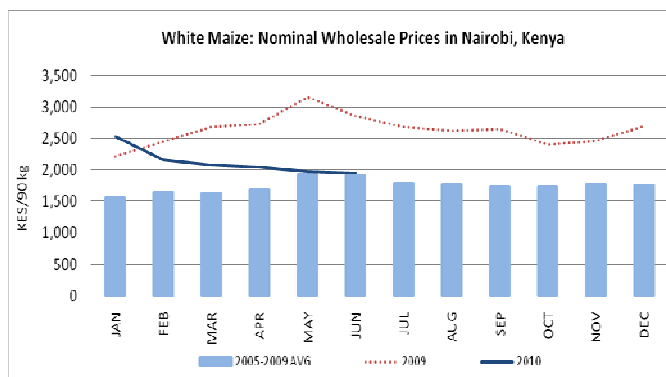
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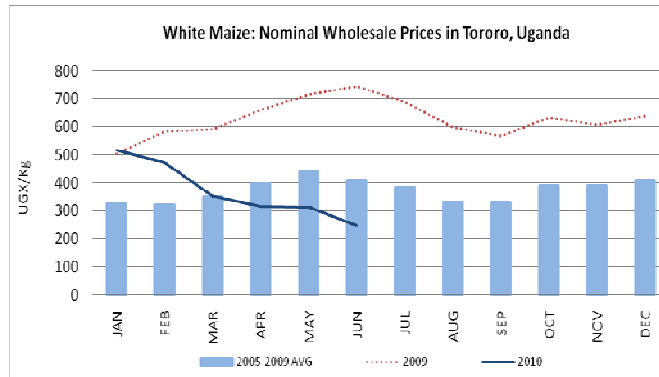
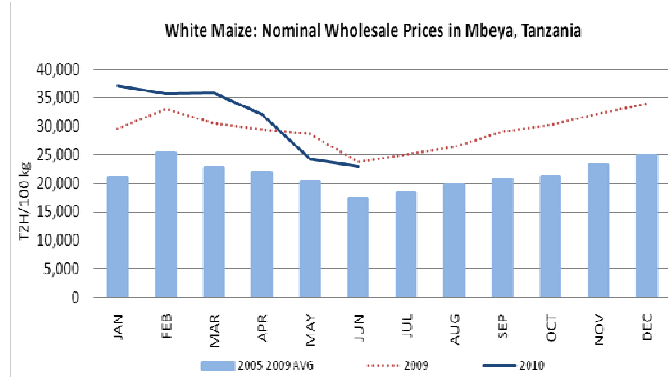
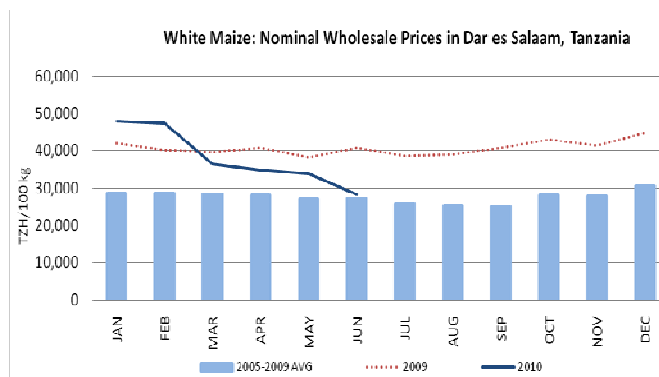
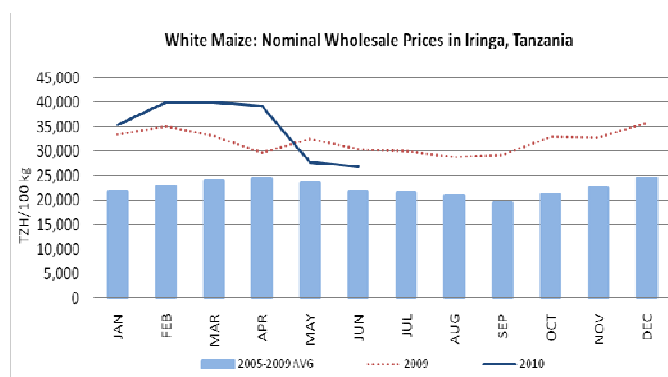
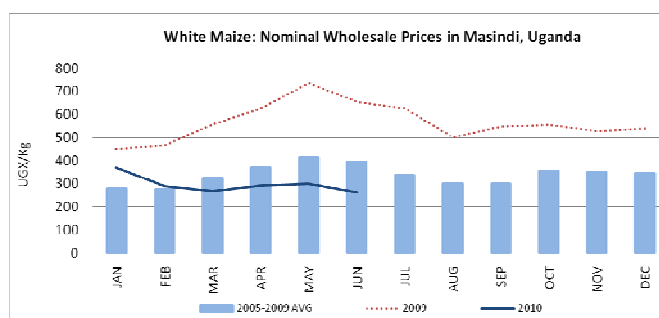
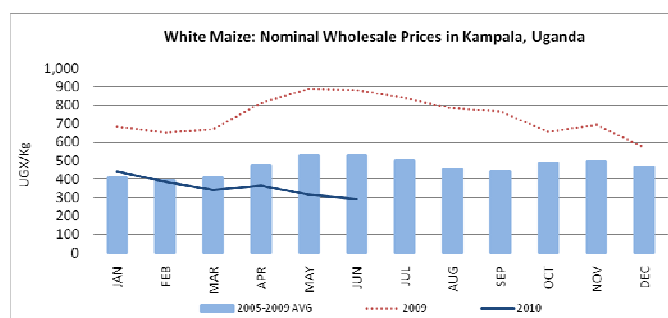
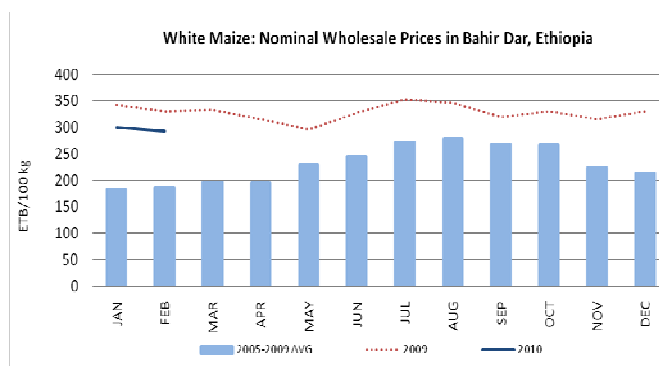
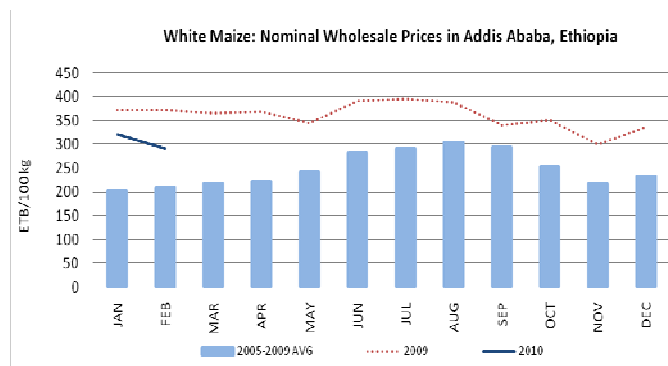


Monthly prices are supplied by FEWS NET enumerators and a range of partners: in Ethiopia, the Central Statistics Agency and FEWS NET; in Kenya, the Ministry of Agriculture (Market Research Branch); in Uganda, the Uganda Market Information System; in Tanzania, the Ministry of Trade, Industries, and Marketing; in Djibouti, the Ministry of Finance; in Somalia, FEWS NET; in Sudan, WFP.

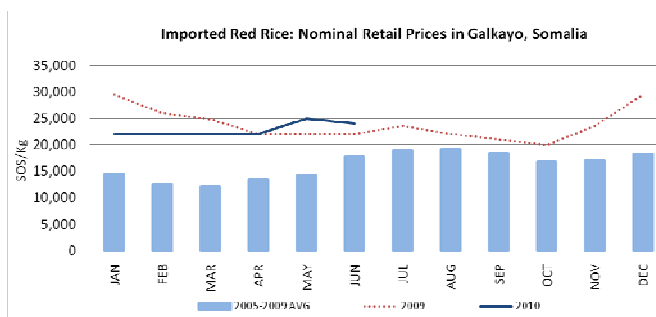
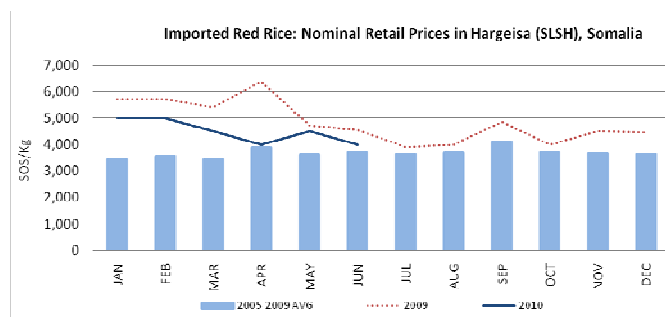
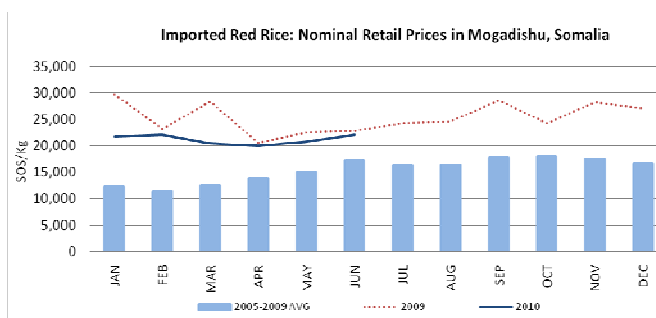
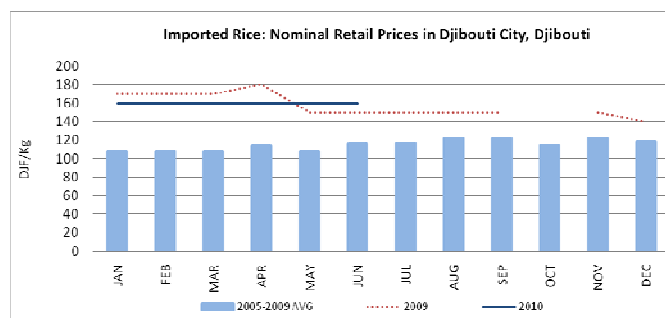
White maize is the main staple grain consumed in Tanzania, Kenya, and Ethiopia. In Uganda, white maize is grown mainly as a commercial crop for export in the region. Imported rice is a major staple for Djibouti and Somalia, which mainly consume *belem*—the imported red rice. Tanzania is also a major producer and source of rice in the region while Kenya and Uganda are minor producers. Both red and white sorghum are produced and consumed in the region. This is an important staple in Sudan, Djibouti and Somalia as well as in other marginal agricultural areas of the region. It is also a substitute cereal among the rural poor. Red sorghum is mainly grown in Ethiopia, Sudan, and Somalia, and is the preferred type for households in Djibouti. Beans are an important source of protein and a complementary food crop grown in the high potential agricultural areas of Kenya, Uganda, Tanzania, Rwanda, Burundi and Ethiopia. It is consumed across household types. Maize and beans are the most heavily traded commodities in the region. The cooking banana—*matoke*—is the primary staple in Uganda. Uganda is also a main source of cooking and other types of bananas traded in the region especially in Southern Sudan. However, bananas are not traded nearly as heavily as maize or beans.

WHITE MAIZE: The markets below represent the major producer and consumer markets in countries where white maize is heavily consumed as the staple.

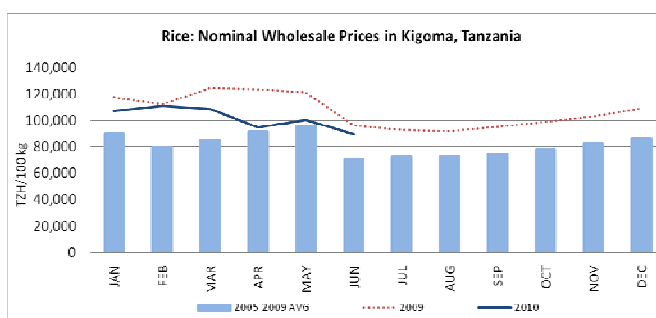
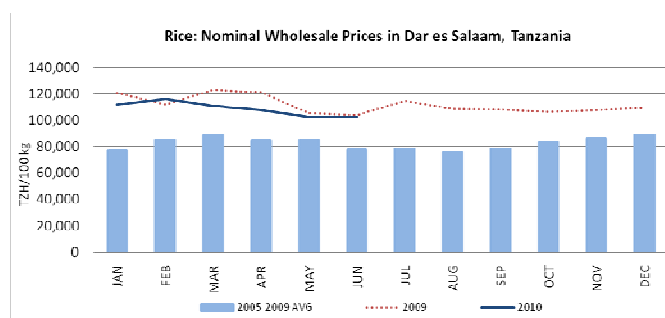




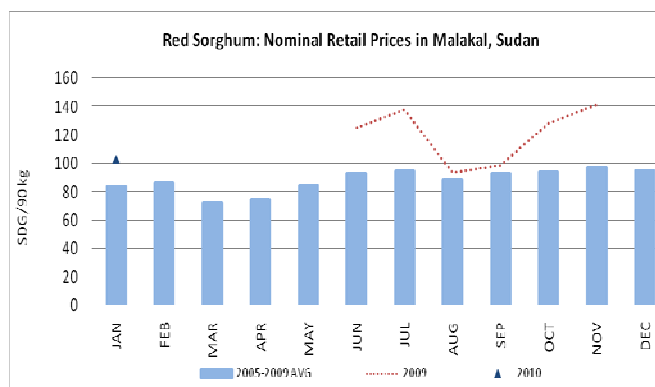
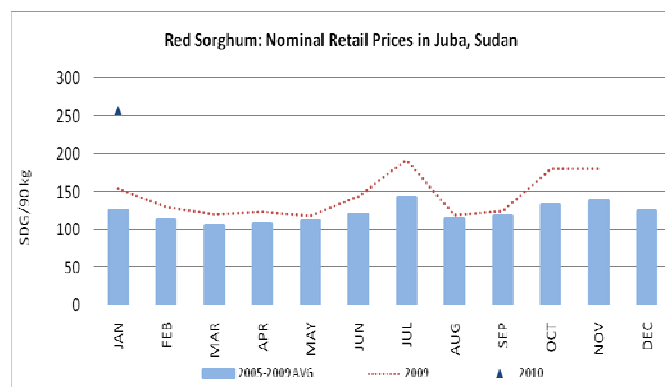
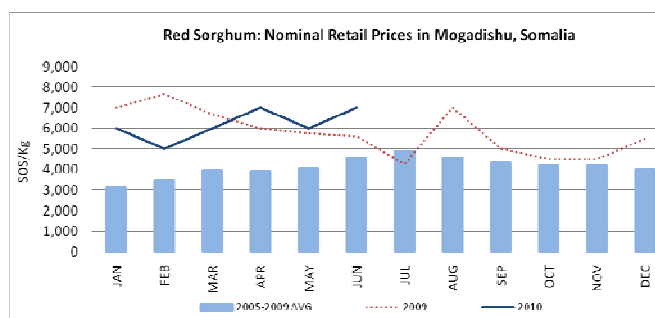
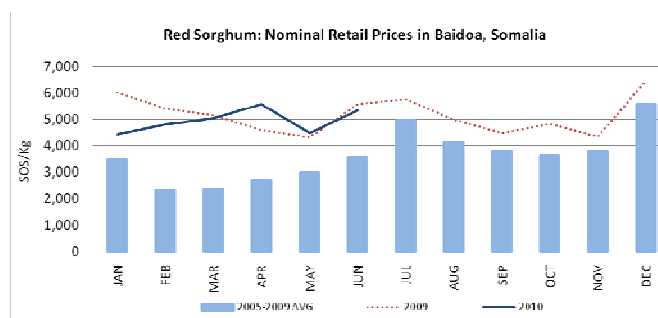
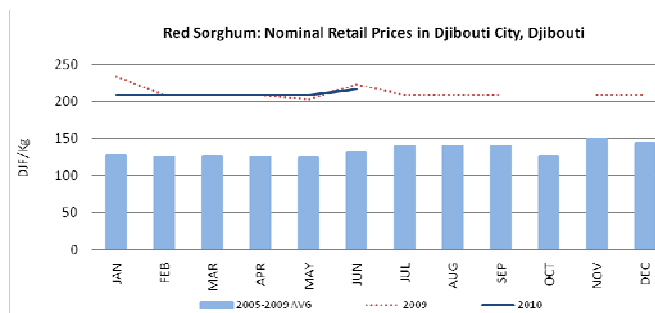
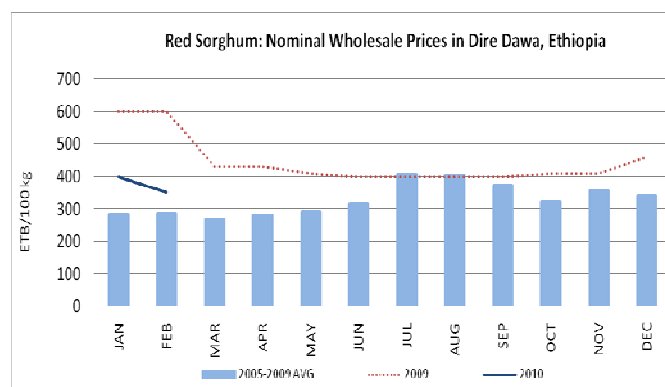
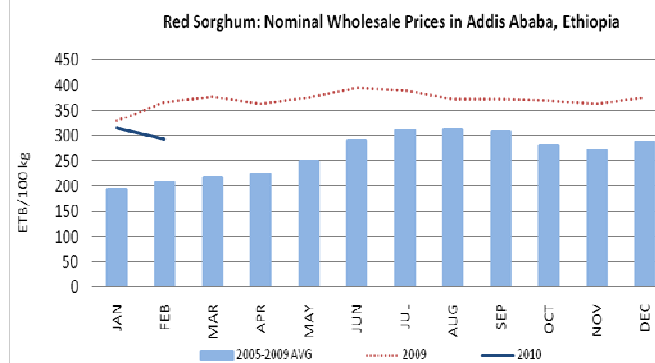
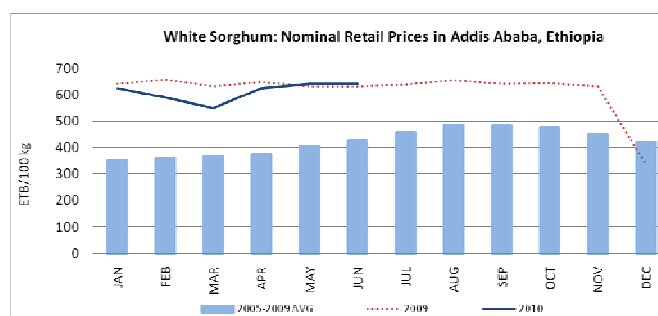
IMPORTED RICE: These are the main retail markets in Djibouti and Somali where imported rice is heavily consumed.



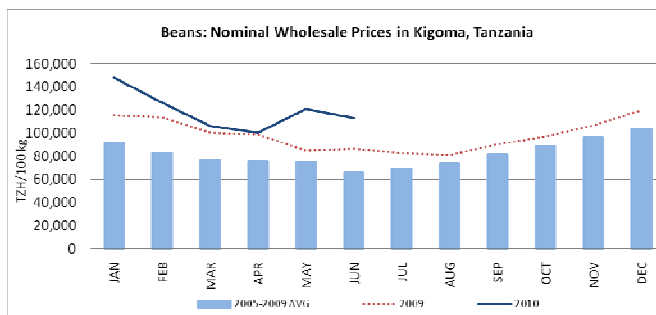
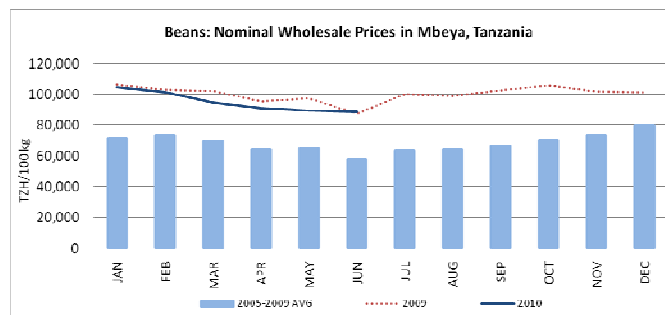
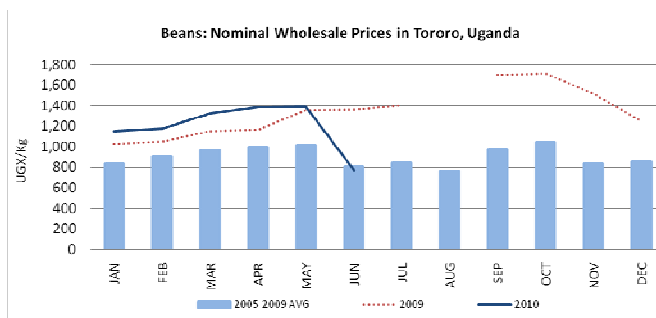
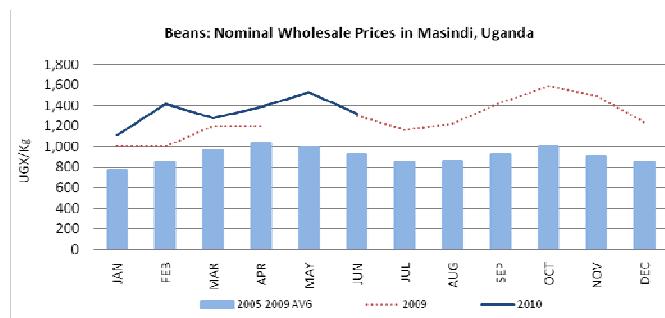
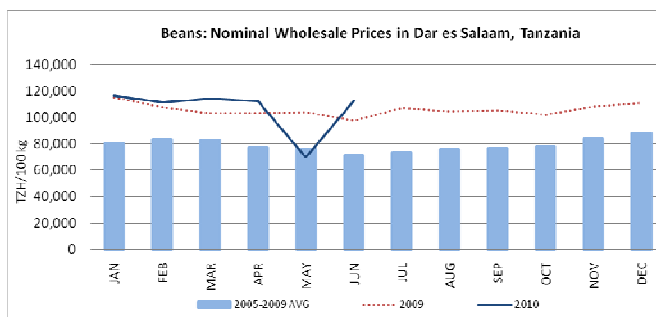
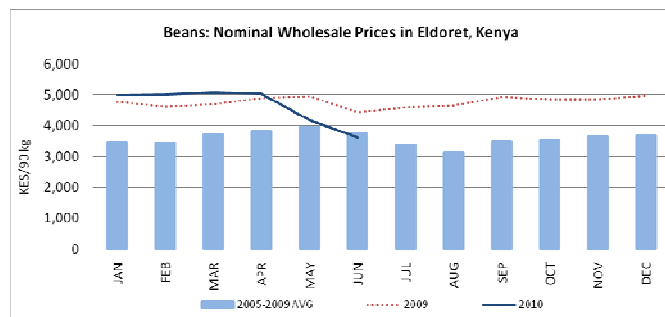
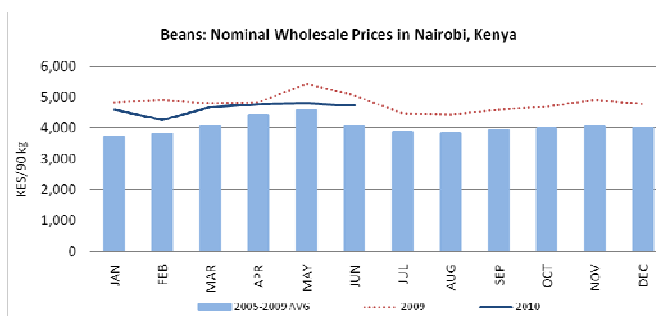
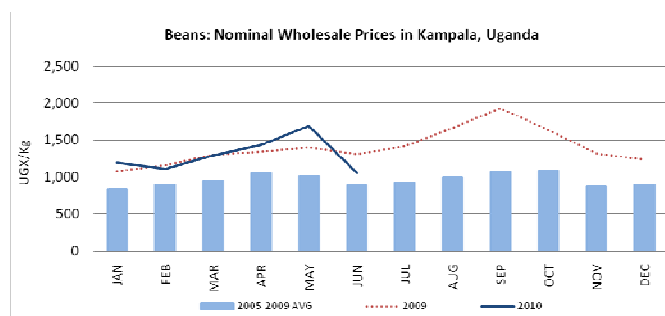
LOCAL RICE: Local rice is produced mostly in Kenya, Uganda and Tanzania. With the exception of Tanzania, most countries in the region are net importers of local rice, which has high demand in urban areas.



RED AND WHITE SORGHUM: Sorghum, both red and white, is an important consumption and production staple for many households in the region. These markets demonstrate the variety of places it is produced and consumed.



BEANS: Beans are a primary protein source throughout the region, especially in Kenya, Uganda and Tanzania. It is also a staple food in northern Sudan as well as in Rwanda and Burundi. These represent the capital city markets in Kenya, Uganda and Tanzania as well as the main production areas.



MATOKE/BANANA: These are the wholesale and retail prices for matoke, cooking banana, in the capital city market of Uganda.

